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## CASE STUDY

### Day of Reckoning for WA Govt. Agency

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Instead of actively trying to manage a records lifecycle, many large government and enterprise organisations today are doing the equivalent of sweeping them under the carpet.

Rather than work out retention & disposal policies for records, they are in many cases hanging on to everything, and when all their storage space is filled up, many just go and buy more.

In the case of one Western Australian State Government Agency, a decision was taken to deal with the substantial issue faced in managing 5,000 boxes located in off-site storage dating back to 1960.

The agency has been underway with a digital EDRMS strategy since 2008, but was faced with increasing storage costs for its off-site physical records storage.

It was also concerned it was not meeting State Records Office requirements for the retention and disposal of records as files have been lodged without sentencing or packing for archival storage.

Information Management and Technology specialist, Information Proficiency was engaged to conduct an outsourced Disposal and Archiving Project to sentence and process the backlog of boxes.

This has involved shifting batches of boxes to Information Proficiency's Midland, Perth premises where their Archiving Team must open each one and examine them for sentencing, recording and repackaging.

Select files are approved for destruction and returned to the off-site storage facility until the destruction date, or alternatively, returned to cold storage pending transfer to the WA State Records Office (SRO).

The agency has obtained consent from SRO to destroy source records as well.

The team is about two thirds of the way through dealing with the 5000 boxes having commenced in 2012, with around 12 months to go.

Information Proficiency project manager Carol Morris, an experienced records manager who has worked at a range of government agencies and the Defence Department, says the problem is not uncommon.

"It's way too time consuming for many government agencies to deal with this issue so they just leave everything where it is. They just haven't had the resources for a start to deal with it.

"However the WA Auditor General is aware of this issue and wants it dealt with."

Morris has been working with the agency to develop a Business Classification Scheme (BCS) and General Disposal Authority (GDA) which will allow for records to be sentenced at creation.

“All emails are now recorded electronically within Objective and the organization is progressively getting as much digitised as possible so that there are less and less paper records.

“For instance all of their forms such as leave requests are now workflowed,” said Morris.

Leisa Wood who manages the processing team for a number of organisations at Information Proficiency said “The team is made up of skilled people dedicated to cataloguing, recording, sentencing and preparing records for storage. The team do this all day and really know their topic, which means we can get through a lot more material than an agency based officer who is distracted by other duties or doesn’t do this sort of work very often.”

“We get a lot of enquiries from customers who simply don’t have the time or resources to process their holdings. We have been doing this work for few years now and getting really good results for both government agencies and private organisations.” said Phillipa Pusell, Account Manager for Information Proficiency.

#### **Results To Date**

- Destroyed: 1,159 boxes;
- 681 boxes sentenced as archives, files prepared and repackaged and placed into cold storage pending transfer to SRO;
- 1,813 boxes sentenced, repackaged and returned to temporary storage pending destruction; and
- Approximately 2,000 boxes remaining to be processed.

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